Module 4. **Master Your Tools**

Power User Hands-On Workshop

KEY CONCEPTS

In this module, you deepen your proficiency with industry-standard software, useful plugins, and online searches of the scientific literature. At baseline, impeccable and consistently booked freelancers must be *advanced users*. To set yourself apart from other advanced users and to build a sustainable business with quality clients, you must disrupt the satisfaction of sitting pretty as an advanced user and become a ***power user.***

In this module, you will:

- Wring more out of MS Word and PowerPoint than you thought professionally possible to streamline your workflow and produce impeccable deliverables (including Styles, Master Slides, and plugins).

- Craft search syntax to leverage PubMed and other databases for faster, more accurate research.

- Solve—or know where to find the answers to solve—your most frustrating technical difficulties.

- Start a blueprint for your in-house style sheets and research processes.

ACTON STEPS

☐ Download *PerfectIt!* and install it in MS Word. All new subscribers get 3 months free.

MS Word[5]

Understand **MS Office nomenclature**.

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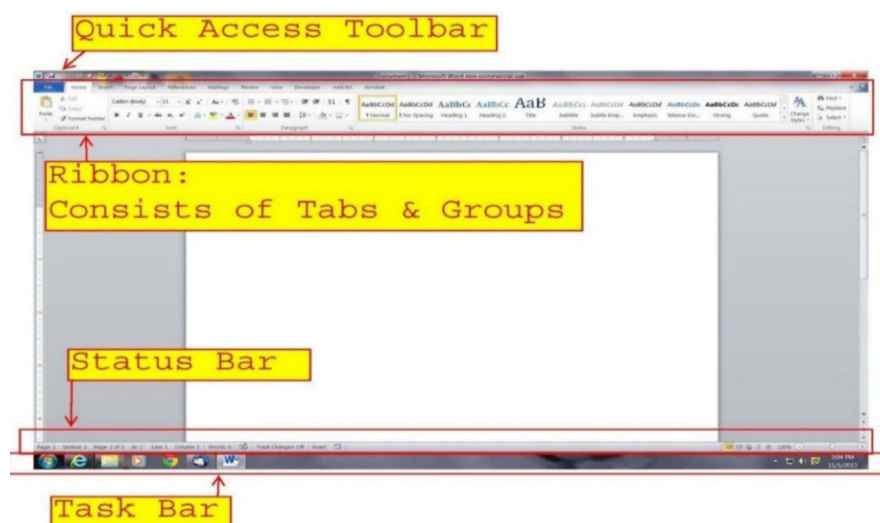
[5] I assume that you are an advanced user of these programs, so I'm presenting these tips in medias res.

Keystrokes

Get out of the mouse trap. **Use keystrokes**[6] to improve your efficiency—and prevent repetitive movement disorders from all the clicking. Many, many keyboard shortcuts exist, but here are some key strokes 😉 to get you started:

Function	Keystroke(s)
Cut	Ctrl X
Copy	Ctrl C
Paste	Ctrl V
Print	Ctrl P
Repeat last action	F4
En dash	Alt 0150
Em dash	Alt 0151
Update TOC	F9
Reveal codes	F11

Styles

Design readable and functional documents using **Styles**. Remember, your computer is not a typewriter. Every character in a Word document has a style attached to it. Documents are generated within templates, so no need to format the text by hand. Styles and templates can be created and shared across documents.

☐ Transfer and share Styles across multiple documents.
    1. Open the **Styles sidebar** and click on **Manage Styles** (Capital A with a green checkmark).


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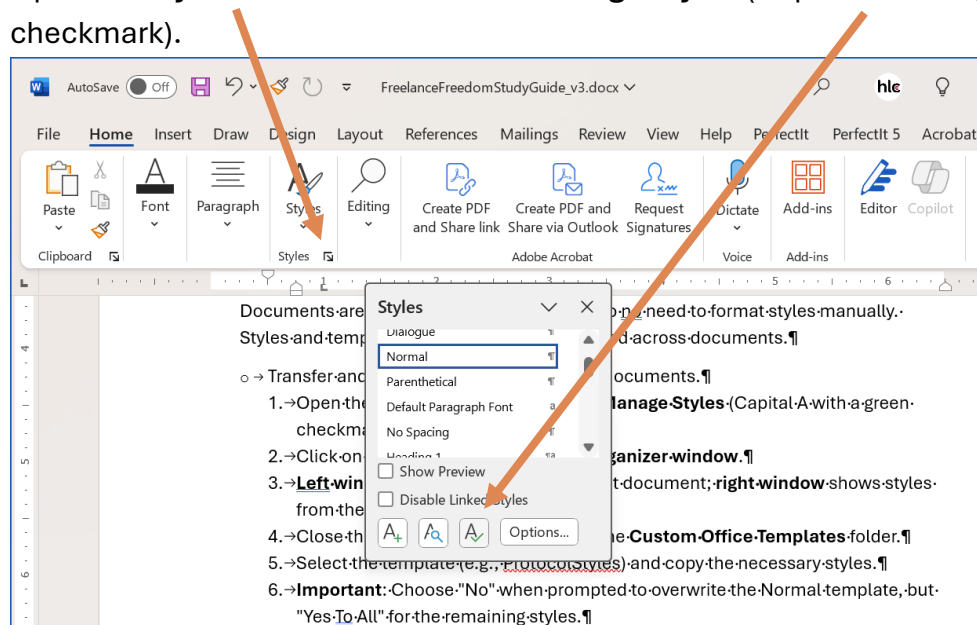
[6] These suggestions are based on Windows machines, not Mac or Linux or any other open-source system. Thanks for understanding and making the necessary adjustments using your OS of choice.

2. Click on **Import/Export** to open the **Manage Styles window**.
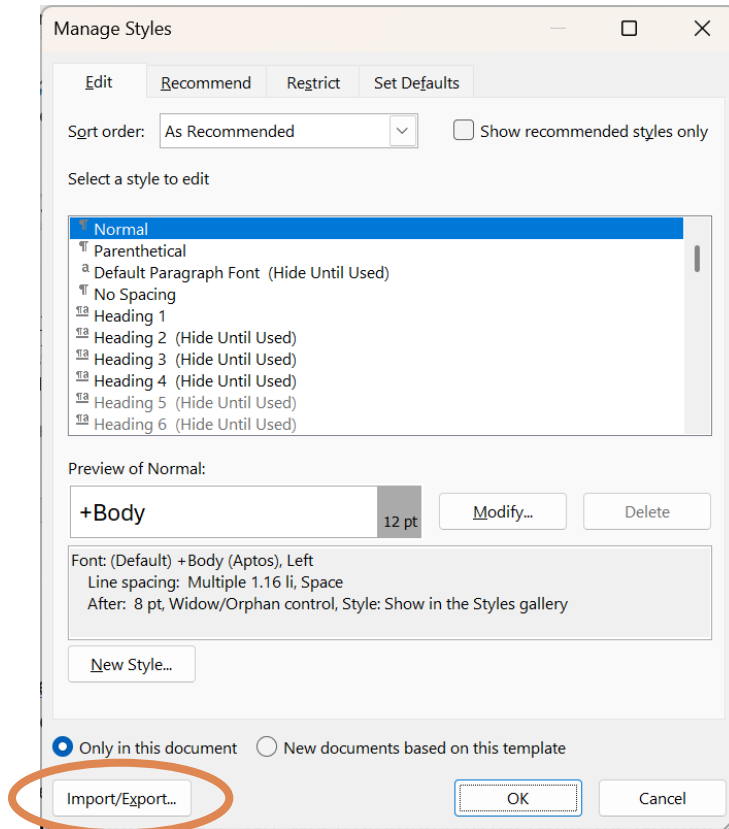
3. This will open the **Organizer Window**. **Left pane** shows styles in the document that you are working on; **right pane** defaults to show styles from the Normal (global) template.
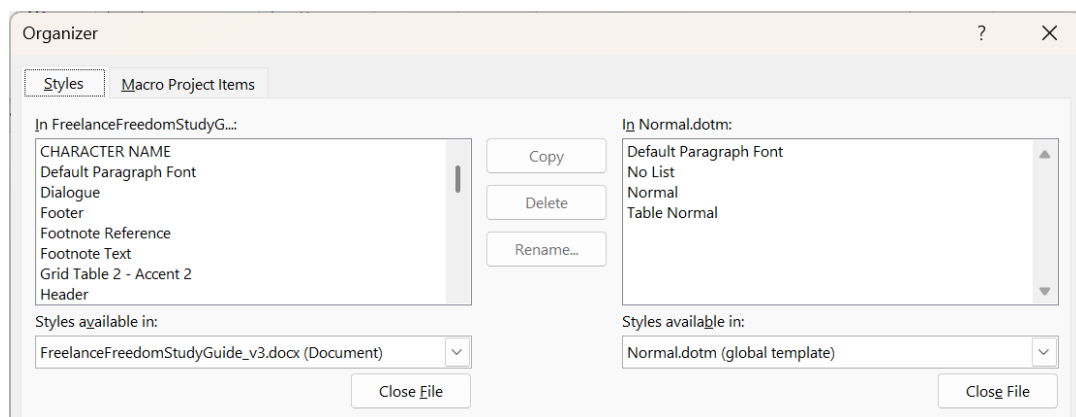
4. Under the right pane, close the Normal (global) template. The Close File button will change to read Open File and the dropdown menu will be blank. Click the Open File button. This default opens the **Custom Office Templates** folder.[7]

5. Select the file that has the Styles for import, highlight the ones you want (typically all of them; Ctrl A keystroke) and copy the necessary styles.
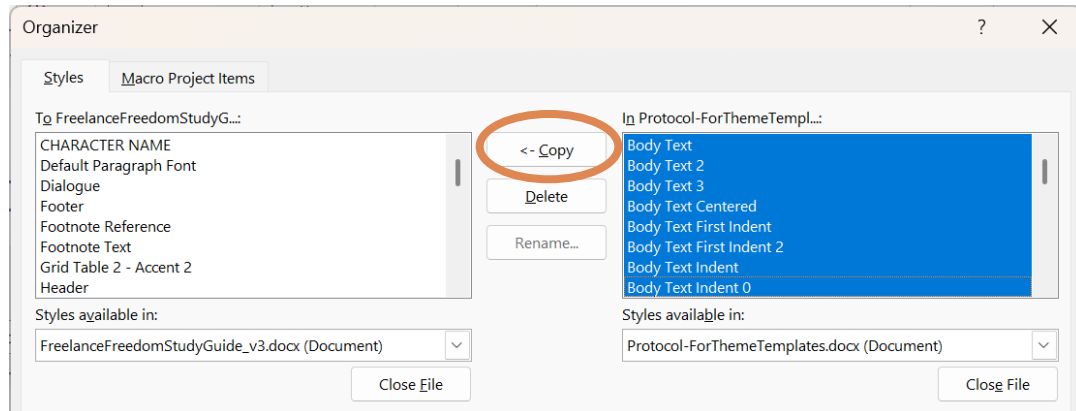

6. *Important*: Choose "No" when prompted to overwrite the Normal template, but "Yes To All" for the remaining styles.

7. Close the Organizer window and the document should now reflect the new styles.

8. Follow the same steps to apply Styles from any custom template or other Word document. Then ensure the document is formatted correctly with the updated styles. This should occur automatically, but it's never wrong to double-check.

Tables of Contents

Use Styles to create **tables of contents** (TOCs). TOCs autogenerate from heading styles (eg, Heading 1, Heading 2). Because of this, the TOC serves as an excellent **QA tool for checking and correcting style-related errors**.

Never edit directly within the TOC. Errors in the TOC typically indicate style problems within the document. If you edit the text in the TOC, any updates will revert back to the errors in

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[7] The default setting searches for Templates only. If the file with the styles to import is not a template (ie, .dotx) but a document (.docx), the file will not appear in the dropdown list.
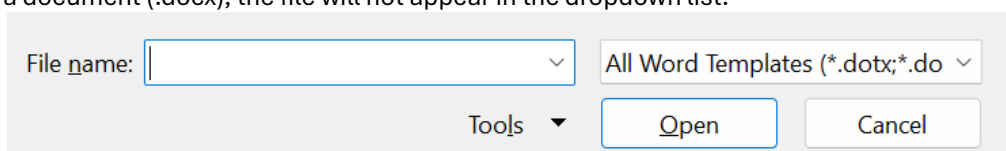
To find your file, change the dropdown option to All Files. Go to the appropriate folder. And voila.
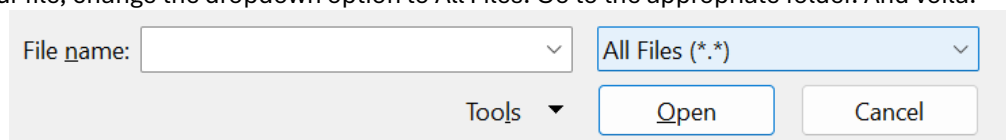
the text that went uncorrected. Correct the heading styles, numbering, and spelling in the body of the document to clean up the TOC.

☐ Correct errors in the TOC.
1. **Update the TOC** by clicking in the TOC field and pressing **F9**.
2. Select **Update Entire Table** to reset styles and check for issues. Make sure each heading is assigned the correct style (eg, Heading 1, Heading 2) and not leftover manual formatting. Depending on the errors in your TOC, remember that there's no need to hand-correct (ie, retype) anything in the TOC itself. Compare the errors (eg, outline numbering, page numbering, random text that's not a heading) to the text and reset, modify, or simply apply the correct styles.
3. **Run a final check**. After all style, numbering, and any other errors are corrected in the text, run the TOC update again (F9) to ensure all styles are applied correctly.

PowerPoint

Master **Master Slides**.

Master Slides provide an automatic way to consistently format and design all slides in a presentation. Any changes made to the Master Slide will automatically apply to all slides that are tied to it.

☐ To **view and edit** Master Slides
1. In PowerPoint, go to the **View** tab. Select **Slide Master** to enter the editing mode of the Master Slides.
2. The first slide is the overarching **Master Slide**, which controls general formatting (font, layout, etc). Other slides below are **Layout Masters**, which define the formatting for specific slide types (title slides, content slides, etc).
3. To ensure consistency across your presentation, changes should be made to the **Master Slide** and **Layout Masters**. Changing the font on the Master Slide will change the font across all Layout Masters. Define the core design early. Set up the Master Slide with fonts, colors, and design elements before adding, importing, or creating content slides.
4. Each Layout Master can be further customized to present slide content the way you envision it. You can let your creativity off the leash (as much as MS Office can allow) when formatting Layout Masters. Pro tip: **think readability**.

☐ To **reuse slides** from other presentations
1. Navigate to the **Home** tab. In the **Slides** group, choose **Reuse Slides**.
2. Select **Browse** and open the desired presentation.
3. Choose slides and decide whether to keep the source formatting or apply the current theme.

- If you select **Keep Source Formatting**, the imported slides will retain their original format (including their Master Slide).
- If not selected, the slides will adopt the Master Slide format from the current presentation.

☐ To manage **multiple Masters**

If you're not starting from scratch, it's likely that the presentation (aka, slide deck) you are working on will have more than one master. You know what they say about having more than one master: you won't know who's really in charge.

For our purposes in PowerPoint, you might encounter two or more Master Slides if you import slides with different formats. You might make changes to one master that won't show up on some slides in the deck. The reason? They don't use the same Master Slide.

1. In the **View** tab, select **Slide Master** to open edit mode. On the left panel with the thumbnails of the Layout Masters, scroll all the way down to see if your presentation has more than one Master Slide.
2. If it does, delete extra Master Slide(s) by right-clicking and selecting **Delete Master**.

PubMed

Again, lots of information available can be found online for how to conduct a useful search in reference databases like PubMed and PubMed Central. How we search in Google or Bing or other online search engines is basically a brain dump of what we want to know. PubMed and PubMed Central are more old school and yield the best results with Boolean construction.

☐ My favorite Boolean search signifiers[8]
   o When you know an **author's name** anywhere in the author list

   o When you know the **first author's name**

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[8] Pay attention to the spacing between the brackets and the text. This syntax is crucial. PubMed is very picky.

- o When you know the **first author**'s name and the **journal**

RECOMMENDED ADDITIONAL TRAINING/SUPPORT

☐ Take any level of MS Word or PowerPoint **course taught by a Microsoft Office Specialist** (MOS). Even though you might have used MS Office for years, start with a beginner course. You will learn more than you can imagine, get inside the vocabulary and structure of the Microsoft universe, and not waste your time hunting and pecking on YouTube to cobble together information not from the horse's mouth.[9] Official Microsoft courses are available throughout the world, both in person and online. Call me old school, but if you can sit in the room with your instructor in your hometown, that's a great way to learn. The efficiencies you learn in these Microsoft-sanctioned courses are worth the time and money spent.

☐ Add these to your **resource library**:

- *Documents, Presentations, and Workbooks Using Microsoft Office to Create Content That Gets Noticed.* Stephanie Krieger. Sebastopol CA: O'Reilly Media, Inc; 2011.

- *Microsoft Word for Medical and Technical Writers*. Peter G. Aitken, PhD & Maxine M. Okazaki, PhD. Chapel Hill NC: Piedmont Medical Writers; 2013.

- *The PC Is Not a Typewriter*. Robin Williams. Berkeley CA: Peachpit Press; 1992. www.peachpit.com

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[9] *How many metaphors can one sentence endure, Hope?*